

2025-2026 Special Circumstance Form for Independent Undergraduate Students



STUDENT NAME: _____
Last First M.I.

UID: _____ TELEPHONE: _____
(University Identification Number on ID Card or Admission Letter)

ADDRESS: _____
Street City State Zip

Instructions for Completing this Form:

1. You must complete the 2025-2026 Free Application for Federal Student Aid (FAFSA) at www.studentaid.gov and review the results before submitting this form to the Office of Student Financial Aid. If your file has been selected for verification, you are required to complete verification before this form can be processed. Please review your to-do list in your MY student portal for any items needed from our office.
2. Please review this form thoroughly to determine if your situation meets the special circumstances criteria that will be considered at Illinois State University. Students are advised not to complete this form if you do not meet the criteria.
3. Student and/or spouse should check the circumstance(s) that apply and provide the required documentation. *If you cannot provide the required documentation, provide a written explanation of why the information is not available.*
4. We are not able to estimate business or seasonal income. For all families with this type of income, we will do an End of Year Review and will require a 2025 federal tax transcript to complete.
5. Special Circumstance reviews can take up to 4-6 weeks to complete depending on when our office receives all documentation, depending on the time of the year, and depending on other processing taking place in our office.
6. Our office will not consider a special circumstance review for students who have a -1500 Student Aid Index (SAI). Please review your FAFSA Submission Summary in your studentaid.gov account for your SAI information from your FAFSA application.

CIRCUMSTANCES THAT AFFECT STUDENT/SPOUSE

Check the categories that apply to the student/spouse and submit supporting documentation.

- ☐ **Unemployment:** Student/Spouse must have earned money in 2024, lost his/her job in 2025 and been unemployed for at least 10 weeks during 2025.

☐ **Student Name** _____ **Layoff/Termination Date** _____
Has Student started another job? No _____ Yes _____ Date Hired _____

☐ **Spouse Name** _____ **Layoff/Termination Date** _____
Has Spouse started another job? No _____ Yes _____ Date Hired _____

Documentation Required:

- Submit a copy of the letter of separation/termination or letter from previous employer on company letterhead stating effective date and the circumstances under which you or your spouse left their employment; and

- Submit unemployment benefits statement from state agency stating start and end dates, gross weekly amount, and total amount of benefits or their denial of benefits letter; and
- Submit proof of severance pay received, 401K, IRA, stocks/bonds, pensions, or other assets converted to cash; and
- Submit a copy of your and your spouse's 2024 Tax Return Transcript from IRS.gov.

☐ **Significant decline in income from 2023 to 2025:** The reduction must reflect a significant decrease in income from 2023 total income reported on the FAFSA. Student/Spouse must have earned money in 2023 and experienced a significant decrease in resources that is the result of disability, natural disaster, retirement, change in employment, or other catastrophic event.

☐ Student: type of income lost _____ Year Lost _____

☐ Spouse: type of income lost _____ Year Lost _____

Documentation Required:

- Submit a letter explaining the situation; and
- Submit a copy of two of the most current pay statements showing gross year-to-date wages from each job worked for both student and spouse; and
- Please submit a copy of your 2024 or 2025 Federal Tax Return Transcript from IRS.gov for the year you indicated above before this form will be processed.

☐ **Lump Sum/ One Time Payment / ROTH IRA Conversion**

Documentation Required:

- Submit documentation explaining the circumstance behind the payment or conversion; and
- Submit documentation showing the amount(s) removed/converted and the amounts available as resources.
- Please note that for one-time payments multiple tax return transcripts may be needed.

☐ **Loss of Child Support:** Child support ended on this date (mm/dd/yy) _____

Documentation Required:

- Submit proof of the amount of child support received in 2024 (copy of divorce decree, cancelled checks, etc.); and
- Submit legal document declaring the date the child support ended.

☐ **Separation or Divorce after the 2025-2026 FAFSA was filed:**

Date of separation/divorce (mm/dd/yy) _____

*Please note that if you are an independent student due to marriage and you do not meet any other qualification on the FAFSA to continue being independent you will now be considered a dependent student and will be required to invite your parent contributor(s).

List the members of your household that physically reside with you or for which you provide over 50% of their support. Use a separate sheet of paper if necessary.

Name	Age	Relationship to you
_____	_____	_____
_____	_____	_____
_____	_____	_____

Documentation Required:

- Submit a copy of legal separation/divorce papers or a copy of each parent's rental lease or home mortgage payment or utility bill addressed to each parent at their residence; and
- Submit proof of spousal support and/or child support received and/or anticipated in 2025; and
- Submit a physically signed copy of the 2023 federal tax return with all schedules, and all 2023 W2s/1099s

☐ **Death of Spouse: Date of Loss (mm/dd/yy)**_____

Documentation Required:

- Submit a copy of the death certificate or obituary; and
- Submit a copy of 2023 federal 1040 tax form and schedules, or 2023 tax return transcript from IRS.gov
- Submit a copy of all 2023 W-2s/1099s, or each of your 2023 wage and income transcripts from IRS.gov.

☐ **Medical or Dental Expenses Paid by your Family in either 2023 or 2024:** You must be able to document that your family paid over 11% of their total income (Adjusted Gross Income) in medical and/or dental expenses, that were medically necessary, from their personal resources in 2023 or 2024. **Do not report payments covered by insurance or payments from business or Flex Spending accounts.** Only report those expenses that would qualify for itemization on a personal Federal Tax Return.

Documentation Required:

- **Complete Medical/Dental Documentation Form** (found on our website) along with copies of your proof of payments in 2023 or 2024. Do not submit notice of benefits or account statements unless they document personal payments made by your family. If you will have continuing medical expenses throughout the 2025 year, please wait until the end of the 2025 year to submit documentation.
- Please submit a copy of your 2024 Federal Tax Return Transcript from IRS.gov if expenses are from 2024.

☐ **Other Circumstances Not Covered by this Form:**

Documentation Required:

- Submit a letter explaining the situation along with supporting evidence; and
- Any other supporting documentation that you may have of the expenses incurred.

CERTIFICATION

This application is a request for Illinois State University to exercise professional judgment after reviewing special circumstances that you feel may change your financial aid eligibility. Professional judgment refers to the school's authority to adjust the data elements reported on the Free Application for Federal Student Aid (FAFSA) so that the Department of Education can recalculate the Student Aid Index (SAI). The SAI is the number that the school uses to determine if a student is eligible for federal, state, and institutional need based financial aid. The school does not have the authority to make direct adjustments to the SAI or to the formula used to calculate the SAI, just data elements on the FAFSA, which may change the SAI.

In many cases, an adjustment does not increase the student's eligibility for grants, or the total amount of aid awarded. The adjustment may only increase the student's eligibility for loans, allow the student to receive a subsidized portion of their federal student loans, or may not result in any increased aid. The Office of Financial Aid reserves the right to deny any appeals that would not increase a student's eligibility for aid.

Please submit photocopies of your documents as we are unable to return original documents.

Sign this Worksheet

By signing this worksheet, you certify that all the information reported here to be considered for a special circumstance review is complete and correct. A signature must be completed in black ink or via a stylus on an electronic device. We will not accept a typed name or a cursive font as a signature.

Student: _____

Printed Name Physical Signature Date

As an independent student and married, the spouse's signature is required.

Spouse: _____

Printed Name	Physical Signature	Date

PLEASE FAX THIS DOCUMENT AND SUPPORTING DOCUMENTATION TO THE FINANCIAL AID OFFICE at: (309) 438-3755. Please include a cover letter that includes the student's full, legal, name and University ID number.

You can also contact our office at (309)438-2231 M-F from 10:00am-4:30pm to inquire about uploading documentation through the student's MY Illinois State portal or mail your documentation to: Financial Aid Office, Campus Box 2320, Normal, IL 61790-2320.

You can check receipt of faxed and uploaded documents online within one business day and receipt of mailed documents within one week. If you have questions, please contact a member of our counseling staff at 309-438-2231 M-F 10:00am-4:30pm or send an email to financialaid@illinoisstate.edu.